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INFORMATION SYSTEMS STUDY 1989

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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,600 members — food retailers and wholesalers and their customers in the United States and overseas. FMI's domestic member companies operate approximately 17,000 retail food stores with a combined annual sales volume of $180 billion — more than half of all grocery sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes more than 200 members from over 50 nations.

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EXECUTIVE SUMMARY

FMI's annual *Information Systems Study* takes a detailed look at important areas in the informations systems department of retail and wholesale food companies. It details averages for those firms with annual sales of $50 million or greater. As the function of the information systems department evolves from simply facilitating the financial and control aspects of the firm to making strategic business decisions, the essential role the department plays becomes even more critical.

The average information systems (IS) department employed 99 people, an average of 79 people for retailers and 149 for wholesalers. Even as the numbers employed by IS departments has increased in recent years, the percent of employees working in the operations area has steadily declined since 1985, dropping from 51.7 percent to 37.9 percent. This trend is explained in large part by a parallel decline in the percentage of data entry employees in operations.

The average budget for the IS department was 0.41 percent of the company's net annual sales, with the largest budget expense going to wages and salaries at 37.2 percent. Equipment, employee fringe benefits, and supplies followed at 26.6, 8.0 and 6.2 percent of budget, respectively. The percentages of the total IS budget allocated to store systems and headquarters/distribution center systems changed significantly after remaining at a very consistent 15.85 percent ratio for the last three years. This year's results find an average of 22.8 percent of the IS expense budget allocated to store systems and 77.2 percent to headquarters/distribution center systems. The average IS department anticipates a 5.84 percent increase in next year's budget.

The majority of a typical IS department's time, 57.3 percent, is spent on new applications or major enhancements with 16.7 percent allocated to store systems and 40.6 percent to headquarters/distribution center systems. Maintenance/problem solving and internal IS projects follow with 31.6 percent and 8.7 percent, respectively.

Approximately 57 percent of the respondents have disaster recovery plans in place that have been reviewed in the past twelve months. Of these firms, 42 percent use a remote "hot site," 18 percent have remote "cold sites," and 21 percent use a "dual site" plan.

The percentage of companies which have moved into advanced use of a wide range of technologies has continued to increase. Distributed processing in-store, in advanced use by 29.0 percent of respondents in 1987, rose to 39.1 percent in 1988. The use of personal computers with mainframe connection climbed from 39.7 percent to 53.0 percent this year. UCS and UCS/DSD have both made significant gains over the last year. Expert systems reported advanced use for the first time with 1.6 percent of companies using this new technology.

This year slightly more companies reported having the communications staff under one manager, 55.4 in 1988 vs. 51.4 percent in 1987. Of these managers, 91.7 percent were in the IS department. Regarding telephone systems, 51.4 percent use Key Systems, 24.3 use PBX, and 16.4 percent use Centrex in their stores. T1 transmission facilities are used by 31.7 percent of responding companies.

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FOREWORD

During the 1980s, the grocery industry made greater and greater use of computer based systems in an attempt to harness the potential power of the information explosion. The belief is that technological advances will make supermarkets more responsive to the consumer, allowing the retailer to provide better customer service and to be more in tune with what the consumer wants. These systems, including scanners, space management, electronic ordering, and direct product profitability models (DPP), initially focused on improving operating efficiency and reducing labor costs.

The way food distributors are using technology is changing. There is a shift away from strictly using it for the financial and control aspects of the business toward using it to make strategic business decisions providing accurate, timely information on product sales patterns. The intense competition in the industry, as well as the heavy debt incurred by many retailers due to mergers and acquisitions, has made these strategic areas critical in the effort to squeeze out maximum profits. The importance of using technology in operating businesses more efficiently cannot be overstated.

The technology of the near future exists today, for the most part, with the necessary ingredient for taking advantage of its benefits being the commitment by a company to look past the short term and make the capital investment needed to maximize use of the systems. Several of the more important factors driving companies to adopt new technologies are improved efficiency and lowered costs, increased sales, more sophisticated marketing and merchandising, and improved customer service.

An excellent example of a new development in data-based system technology, promising far-reaching effects in retail merchandising, is smart cards. These cards, resembling credit cards but with a computer chip with memory capacity, are projected to be used commonly at point of sale for payment and record transaction. It is anticipated that smart cards will be used by a great majority of the population for such functions as accessing bank account records, keeping medical records, as well as administering government benefits. Issues, such as consumer privacy and who owns the information stored on the card, must be resolved. Cards are expected to be in wide use by the mid-1990s. The information from the smart cards will enable retailers to target promotions to specific individuals and even to analyze each customer and how that customer affects profitability.

As sales tracking becomes more sophisticated and accessible at the store level, more control can be placed in the hands of the store manager to allow him to make his own merchandising decisions. The present and future availability of the myriad decision-support systems will certainly facilitate this possibility. With the increased flexibility and quicker reaction time made possible by decisions based on a specific local market, stores can speed market response time.

The study points to a dramatic increase in the use of electronic technologies over the last several years, with many progressing from the evaluation stage, through development, to advanced use by substantial numbers of firms. Even so, the actual benefits realized to this point remain modest compared with the potential that exists. It is this potential which must be tapped as the industry moves into the 1990s.

FIGURE 1
Percentage of Information Systems Employees by Job Category

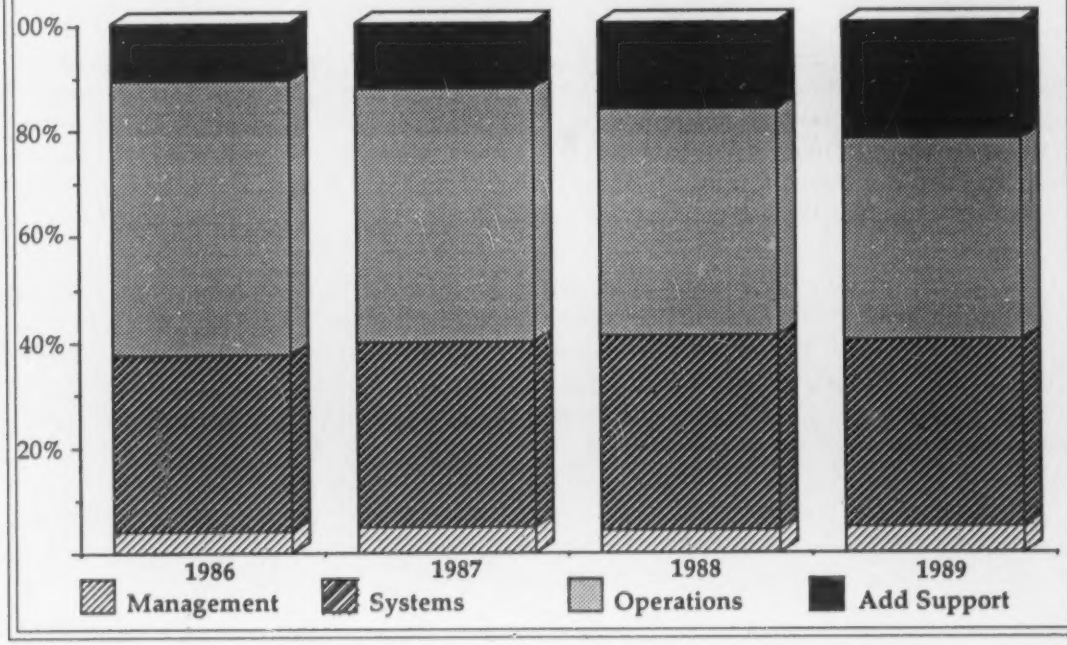
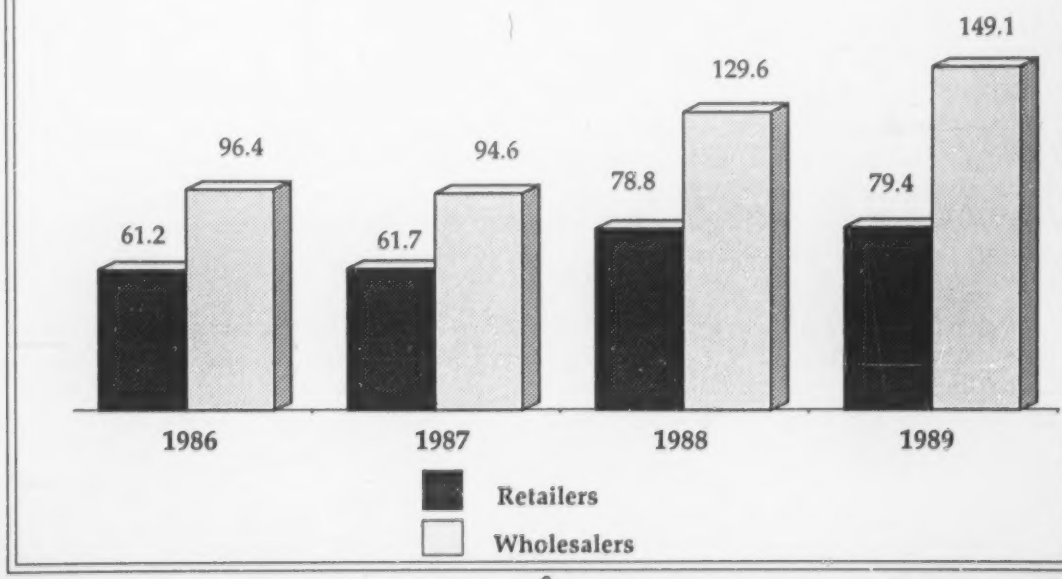


FIGURE 2
Average Number of Information Systems Employees (Excluding data entry)



PERSONNEL

The average number of employees working in IS departments in the industry continued to rise, going from 92.4 in 1987 to 99.4 in 1988 (Figure 2). The increase in the number of wholesaler employees was largely responsible for this rise (129.6 to 149.1 during the same period).

The percent of information systems (IS) employees in the operations area has continued the steady downward trend which began in 1986, dropping from a high of 51.7 percent to the present 36.4 percent (Figure 1). Of the personnel categories in the area of operations, only the percentage of employees involved in data entry shows a parallel trend, dropping from 16.5 percent to 7.8 percent over the same period.

Other operations categories have remained fairly stable. The previous trend of an increasing percentage of people involved in the systems area has stabilized, declining slightly from 36.9 percent in 1987 to 34.1 percent in 1988. The percentage representing the additional support area has, on the other hand, continued its four year upward movement from 10.7 percent in 1986 to the present 21.1 percent. The increase seen in the additional support area was due in part to the significant rise in the percentage of people working in areas of the help desk and technical support/systems programming, possibly indicating a move toward bringing the store support function in-house.

Q1. PLEASE PROVIDE THE NUMBER OF EMPLOYEES IN YOUR COMPANY DIRECTLY INVOLVED IN THE INFORMATION SYSTEMS FUNCTION.

TABLE 1-1
PERCENTAGE OF IS EMPLOYEES IN EACH JOB CATEGORY -- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	65	10	9	16	16	13
IS MANAGEMENT:						
SENIOR MANAGEMENT	1.4	6.2	5.1	3.2	3.0	1.4
GENERAL ADMINISTRATION/ SECRETARIAL	3.3	.6	4.0	2.3	2.5	2.5
TOTAL MANAGEMENT	4.7	9.5	9.1	5.5	5.5	3.9
SYSTEMS:						
ADMINISTRATION & MANAGEMENT	3.2	4.6	7.1	3.0	2.3	3.0
DATA BASE/DATA ADMINISTRATION	2.0	3.2	2.4	1.4	2.5	1.8
PROJECT MANAGEMENT	5.0	1.6	9.0	4.4	6.2	4.2
DEVELOPMENT (ANALYST/ PROGRAMMERS)	24.4	13.4	19.4	18.9	27.5	23.5
OTHER	.8	-	-	.5	1.6	1.0
TOTAL SYSTEMS	35.5	25.1	37.8	28.2	40.1	33.4
OPERATIONS:						
ADMINISTRATION/MANAGEMENT/ SUPERVISION	6.4	1.9	4.9	4.4	6.2	7.7
OPERATIONS	20.3	17.6	15.7	16.6	18.0	23.3
DATA ENTRY EMPLOYEES	8.1	27.0	14.4	16.0	10.5	8.6
OTHER	3.3	-	-	3.7	2.3	4.3
TOTAL OPERATIONS	37.9	46.5	35.0	40 9	37.0	43.7
ADDITIONAL SUPPORT AREAS:						
STORE SYSTEMS SUPPORT	2.3	2.6	2.4	5.8	2.5	2.0

Continued

TABLE 1-1

PERCENTAGE OF IS EMPLOYEES IN EACH JOB CATEGORY – ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
SCANNING SUPPORT	1.2	15.2	2.6	1.4	1.2	2.6
INFORMATION CENTER	1.6	-	1.6	1.6	1.7	.9
HELP DESK	3.1	-	4.8	3.7	2.1	3.1
DATA SECURITY	.8	-	-	.6	.3	.3
TELECOMMUNICATIONS VOICE	.8	.1	.1	.8	1.1	.9
TELECOMMUNICATIONS DATA	2.8	.2	.8	.8	1.4	1.8
TECHNICAL SUPPORT/SYSTEMS PROGRAMMERS	5.7	.3	4.0	3.4	3.8	4.7
RETAIL AUTOMATION/SUPPORT	.3	.3	1.9	3.0	1.4	.5
QUALITY ASSURANCE	1.5	-	-	.4	.6	.7
OTHER	1.9	-	-	4.0	1.4	1.5
TOTAL ADDITIONAL SUPPORT	21.9	18.8	18.1	25.5	17.5	19.0

NOTE: DATA WEIGHTED BY COMPANY SALES

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

Q1. PLEASE PROVIDE THE NUMBER OF EMPLOYEES IN YOUR COMPANY DIRECTLY INVOLVED IN THE INFORMATION SYSTEMS FUNCTION.

TABLE 1-2

PERCENTAGE OF IS EMPLOYEES IN EACH JOB CATEGORY -- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	47	9	7	12	11	7
IS MANAGEMENT:						
SENIOR MANAGEMENT	1.2	5.6	4.2	3.2	2.7	.9
GENERAL ADMINISTRATION/ SECRETARIAL	1.6	.7	2.8	2.3	2.6	2.7
TOTAL MANAGEMENT	4.8	9.2	7.0	5.5	5.3	3.6
SYSTEMS:						
ADMINISTRATION & MANAGEMENT	3.3	4.9	7.5	2.9	2.3	3.1
DATA BASE/DATA ADMINISTRATION	2.2	3.4	2.2	.9	2.9	2.1
PROJECT MANAGEMENT	5.5	1.7	10.1	4.9	5.4	5.1
DEVELOPMENT (ANALYST/ PROGRAMMERS)	24.8	12.3	16.5	18.3	29.8	23.8
OTHER	1.0	-	-	.6	1.6	1.8
TOTAL SYSTEMS	36.8	24.9	36.2	27.5	42.0	35.9
OPERATIONS:						
ADMINISTRATION/MANAGEMENT/ SUPERVISION	5.5	2.0	5.6	4.8	6.2	5.9
OPERATIONS	19.3	16.9	16.1	16.1	19.1	22.3
DATA ENTRY EMPLOYEES	6.8	26.9	15.6	15.7	8.3	5.4
OTHER	2.6	-	-	4.1	1.8	3.0
TOTAL OPERATIONS	34.2	45.8	37.3	40.7	35.3	36.5
ADDITIONAL SUPPORT AREAS:						
STORE SYSTEMS SUPPORT	2.6	2.8	3.0	5.1	2.6	2.6

TABLE 1-2

PERCENTAGE OF IS EMPLOYEES IN EACH JOB CATEGORY -- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
SCANNING SUPPORT	.7	16.3	3.3	1.8	.8	2.2
INFORMATION CENTER	1.8	-	2.0	2.0	1.6	1.0
HELP DESK	3.8	-	6.0	3.9	2.4	5.6
DATA SECURITY	.9	-	-	.7	.3	.3
TELECOMMUNICATIONS VOICE	.8	.2	.1	1.0	1.2	1.1
TELECOMMUNICATIONS DATA	3.1	.3	1.0	.8	1.7	1.8
TECHICAL SUPPORT/SYSTEMS PROGRAMMERS	6.3	.3	4.2	3.5	3.8	5.6
RETAIL AUTOMATION/SUPPORT	.2	.3	-	2.3	1.3	.5
QUALITY ASSURANCE	1.7	-	-	.4	.7	.9
OTHER	2.2	-	-	4.9	1.0	2.2
TOTAL ADDITIONAL SUPPORT	24.2	20.1	19.5	26.3	17.5	24.0

NOTE: DATA WEIGHTED BY COMPANY SALES

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 1-3

PERCENTAGE OF IS EMPLOYEES IN EACH JOB CATEGORY -- WHOLESALERS

	AVERAGE
TOTAL	18
IS MANAGEMENT:	
SENIOR MANAGEMENT	2.1
GENERAL ADMINISTRATION/ SECRETARIAL	2.2
TOTAL MANAGEMENT	4.4
SYSTEMS:	
ADMINISTRATION & MANAGEMENT	2.9
DATA BASE/DATA ADMINISTRATION	1.4
PROJECT MANAGEMENT	3.5
DEVELOPMENT (ANALYST/ PROGRAMMERS)	23.1
OTHER	.2
TOTAL SYSTEMS	31.0
OPERATIONS:	
ADMINISTRATION/MANAGEMENT/ SUPERVISION	9.4
OPERATIONS	23.8
DATA ENTRY EMPLOYEES	12.4
OTHER	5.6
TOTAL OPERATIONS	50.4
ADDITIONAL SUPPORT AREAS:	
STORE SYSTEMS SUPPORT	1.6
SCANNING SUPPORT	3.0
INFORMATION CENTER	.8
HELP DESK	.6
DATA SECURITY	.2
TELECOMMUNICATIONS VOICE	.6
TELECOMMUNICATIONS DATA	1.8
TECHNICAL SUPPORT/SYSTEMS PROGRAMMERS	3.7
RETAIL AUTOMATION/SUPPORT	.6
QUALITY ASSURANCE	.5
OTHER	.9
TOTAL ADDITIONAL SUPPORT	14.2

NOTE: DATA WEIGHTED BY COMPANY SALES

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

Q1. PLEASE PROVIDE THE NUMBER OF EMPLOYEES IN YOUR COMPANY DIRECTLY INVOLVED IN THE INFORMATION SYSTEMS FUNCTION.

TABLE 2-1
AVERAGE NUMBER OF INFORMATION SYSTEMS EMPLOYEES BY SIZE AND TYPE OF COMPANY

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	99.4	8.1	20.9	46.8	95.5	264.0
RETAILERS	79.4	8.2	21.6	43.7	96.5	228.5
WHOLESALERS	149.1	7.0	18.5	56.3	93.2	299.6

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

FIGURE 3
Percentage of Net Company Sales Budgeted to the IS Department 1985-1989

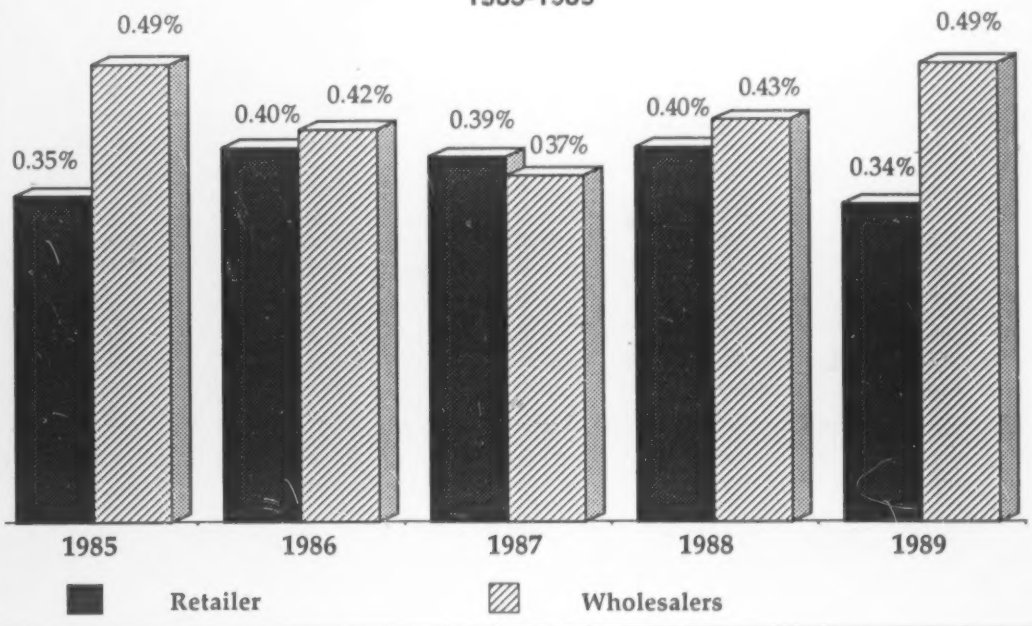
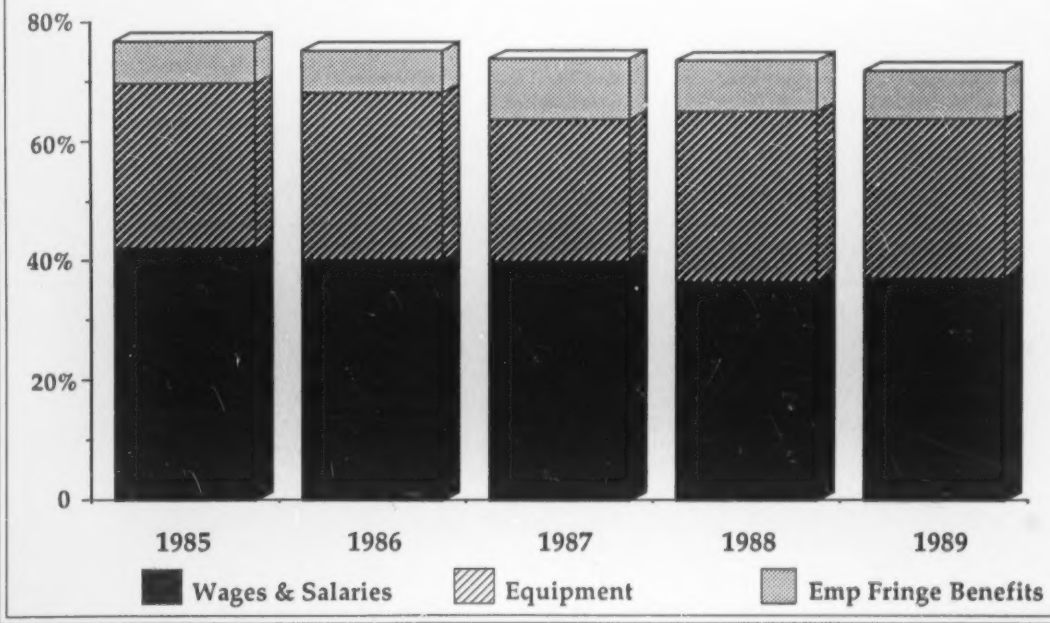


FIGURE 4
Percentage of IS Expenses Allocated to: (Top Three Areas)



BUDGETS

In 1988 the percentage of net company sales budgeted to the IS department was 0.41 percent, an average amount of $9,308,019 per company for annual IS department expenses. This percentage has remained consistent over the past six years (Figure 3), with the average dollar figure allocated to IS expenses rising considerably in proportion to company sales, from an average of $7,843,194 in 1987 to 9,308,019 in 1988. The average company expense for IS department salaries and wages was again the largest budget item at $4,198,515 (an average of $3,796,399 for retailers and $4,977,619 for wholesalers) representing 37.2 percent of IS expenses. The next three largest expense areas remain: equipment, employee fringe benefits, and supplies at 26.6 percent, 8 percent and 6.2 percent respectively (Figure 4).

An expected IS budget increase of 5.84 percent was reported by surveyed companies, down slightly from the 6.17 percent project for 1987.

The percentages of the total IS expense budget allocated to the store systems and headquarters and distribution center systems changed significantly after remaining in a very narrow range for the last three years (15:85 percent ratio for store vs. headquarter expenses). This year's figures show an average of 22.8 percent of the IS expense budget allocated to store systems vs. 77.2 percent to headquarters and distribution center systems. The change is due to a shift both for retailers (23.9 and 76.1 percent) and wholesalers (21.5 and 78.5 percent) and may point more toward distributed systems, particularly among the larger companies.

Q2. FOR THIS FISCAL YEAR, PLEASE PROVIDE THE PERCENT OF YOUR TOTAL COMPANY INFORMATION SYSTEMS EXPENSE BUDGET THAT IS YOUR BUDGET RESPONSIBILITY ALLOCATED TO EACH OF THE FOLLOWING AREAS. PLEASE EXCLUDE ALL EQUIPMENT AND MAINTENANCE COSTS FOR IN-STORE SYSTEMS.

TABLE 3-1

PERCENTAGE OF IS EXPENSES IN EACH OF THE FOLLOWING AREAS ** -- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	48	3	6	12	15	12
WAGES AND SALARIES	37.2	36.5	36.2	35.5	41.6	35.6
EQUIPMENT (RENTAL, MAINTENANCE AND DEPRECIATION)	26.6	33.4	22.1	26.6	26.9	26.6
EMPLOYEE FRINGE BENEFITS	8.0	7.3	7.6	7.4	8.2	8.0
SUPPLIES	6.2	12.5	8.6	9.3	5.9	5.8
SOFTWARE RENTAL, AMORTIZATION, AND PURCHASE	5.9	3.4	8.3	7.1	8.1	4.6
OVERHEAD	4.2	0	5.1	2.6	1.6	5.5
OUTSIDE PROFESSIONAL SERVICES	2.7	0	6.5	1.2	1.2	3.5
DATA COMMUNICATIONS	2.5	0	1.5	1.4	2.2	2.8
VOICE COMMUNICATIONS	1.0	0	.4	5.3	.4	.7
EDUCATION, TRAINING	.9	.6	1.4	.5	1.0	.9
DISASTER RECOVERY	.6	.3	.6	.3	.5	.6
SCANNING	.4	0	1.0	.4	.2	.5
SERVICE BUREAUS	.3	0	0	1.2	0	.3
PERSONAL COMPUTERS RETAIL SERVICE	.2	0	0	0	.2	.2
HELP DESK	.1	0	0	.4	0	.2
OTHER	3.4	6.1	1.0	.7	1.9	4.5

** QUESTION WAS REWORDED AND RESULTS MAY NOT BE COMPARABLE WITH PREVIOUS YEARS

NOTE: DATA WEIGHTED BY IS EXPENSE BUDGET

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 3-2

PERCENTAGE OF IS EXPENSES IN EACH OF THE FOLLOWING AREAS ** -- RETAILERS

	AVERAGE	TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
		$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	32	2	5	9	10	6
WAGES AND SALARIES	38.5	38.2	37.9	38.4	42.1	36.4
EQUIPMENT (RENTAL, MAINTENANCE AND DEPRECIATION)	24.1	33.6	15.8	24.5	26.3	23.1
EMPLOYEE FRINGE BENEFITS	8.1	6.9	8.8	7.1	7.3	8.7
SOFTWARE RENTAL, AMORTIZATION, AND PURCHASE	6.4	5.2	8.8	7.0	8.5	4.8
SUPPLIES	5.5	13.2	9.8	10.5	5.3	4.3
OVERHEAD	3.4	0	6.5	.9	2.2	4.5
OUTSIDE PROFESSIONAL SERVICES	3.3	0	8.1	.5	1.1	5.0
DATA COMMUNICATIONS	2.4	0	.6	2.0	2.3	2.7
VOICE COMMUNICATIONS	1.1	0	.2	4.1	.5	1.0
EDUCATION, TRAINING	.9	.9	.8	.5	1.0	.8
DISASTER RECOVERY	.7	.4	.7	.4	.6	.8
SCANNING	.7	0	1.2	.4	.2	.9
SERVICE BUREAUS	.4	0	0	1.9	0	.3
PERSONAL COMPUTERS RETAIL SERVICE	.3	0	0	.1	.2	.3
HELP DESK	.2	0	0	.5	0	.3
OTHER	4.1	1.6	.7	1.2	2.2	5.9

** QUESTION WAS REWORDED AND RESULTS MAY NOT BE COMPARABLE WITH PREVIOUS YEARS

NOTE: DATA WEIGHTED BY IS EXPENSE BUDGET

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 3-3

PERCENTAGE OF IS EXPENSES IN EACH OF THE FOLLOWING AREAS ** – WHOLESALERS

	AVERAGE
TOTAL	16
WAGES AND SALARIES	35.5
EQUIPMENT (RENTAL, MAINTENANCE AND DEPRECIATION)	29.8
EMPLOYEE FRINGE BENEFITS	7.9
SUPPLIES	7.2
SOFTWARE RENTAL, AMORTIZATION, AND PURCHASE	5.2
OVERHEAD	5.1
DATA COMMUNICATIONS	2.5
OUTSIDE PROFESSIONAL SERVICES	1.9
EDUCATION, TRAINING	.9
VOICE COMMUNICATIONS	.9
DISASTER RECOVERY	.4
SERVICE BUREAUS	.2
HELP DESK	0
SCANNING	0
PERSONAL COMPUTERS RETAIL SERVICE	0
OTHER	2.5

** QUESTION WAS REWORDED AND RESULTS MAY NOT BE COMPARABLE WITH PREVIOUS YEARS

NOTE: DATA WEIGHTED BY IS EXPENSE BUDGET

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

Q3. PLEASE PROVIDE THE FOLLOWING IS BUDGET EXPENSE NUMBERS FOR THIS FISCAL YEAR. ONLY ACCOUNT FOR THOSE ITEMS THAT ARE YOUR BUDGET RESPONSIBILITY.

A. DOLLARS OF TOTAL COMPANY EXPENSE BUDGET ALLOCATED FOR IS WAGES AND SALARIES: INCLUDING FRINGE BENEFITS AND EXCLUDING FRINGE BENEFITS.

B. DOLLARS OF TOTAL COMPANY EXPENSE BUDGET FOR ALL IS ITEMS COVERED IN QUESTION 2.

C. PERCENTAGE OF NET COMPANY SALES BUDGETED TO THE IS DEPARTMENT FOR THIS FISCAL YEAR.

D. ACTUAL IS DOLLARS SPENT FOR THE MOST RECENTLY COMPLETED FISCAL YEAR AS A PERCENTAGE OF NET COMPANY SALES.

E. EXPECTED PERCENTAGE INCREASE IN YOUR BUDGET FOR IS ITEMS IN THE UPCOMING FISCAL YEAR.

TABLE 4-1

BUDGET EXPENSES *** -- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	47	4	7	13	12	11
BUDGET DOLLARS ALLOCATED TO IS DEPARTMENT SALARIES AND WAGES, INCLUDING FRINGE BENEFITS*	4198515	225417	731725	1464563	5067785	10132158
TOTAL	49	4	7	13	14	11
BUDGET DOLLARS ALLOCATED TO IS DEPARTMENT SALARIES AND WAGES, EXCLUDING FRINGE BENEFITS*	3279651	188972	554513	1219926	3763397	7956255
TOTAL	50	3	6	13	15	13
BUDGET DOLLARS ALLOCATED TO ALL IS DEPARTMENT EXPENSES*	9308019	549221	1706460	3085954	7534409	23106227
TOTAL	47	3	6	12	14	12
PERCENTAGE OF NET COMPANY SALES BUDGETED TO IS DEPARTMENT (THIS FISCAL YEAR)**	.41	.43	.61	.43	.41	.40
TOTAL	49	3	6	13	15	12
ACTUAL IS EXPENSE AS A PERCENTAGE OF NET COMPANY SALES (MOST RECENT FISCAL YEAR)**	.40	.39	.59	.41	.41	.38
TOTAL	48	3	4	13	15	13
EXPECTED IS BUDGET INCREASE FOR NEXT FISCAL YEAR**	5.84	7.30	.07	4.90	9.49	4.69

* UNWEIGHTED DATA

** DATA WEIGHTED BY INFORMATION SYSTEMS EXPENSE BUDGET

*** QUESTION WAS REWORDED AND RESULTS MAY NOT BE COMPARABLE WITH PREVIOUS YEARS

TABLE 4-2

BUDGET EXPENSES *** -- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	31	3	5	10	7	6
BUDGET DOLLARS ALLOCATED TO IS DEPARTMENT SALARIES AND WAGES, INCLUDING FRINGE BENEFITS*	3796397	223889	760295	1273409	6097506	9633090
TOTAL	32	3	5	10	9	5
BUDGET DOLLARS ALLOCATED TO IS DEPARTMENT SALARIES AND WAGES, EXCLUDING FRINGE BENEFITS*	2818247	190295	621868	1078294	4263545	7469770
TOTAL	33	2	5	10	10	6
BUDGET DOLLARS ALLOCATED TO ALL IS DEPARTMENT EXPENSES*	7339735	548832	1627754	2609569	7968716	21198663
TOTAL	30	2	5	9	9	5
PERCENTAGE OF NET COMPANY SALES BUDGETED TO IS DEPARTMENT (THIS FISCAL YEAR)**	.34	.35	.66	.27	.40	.28
TOTAL	32	2	5	10	10	5
ACTUAL IS EXPENSE AS A PERCENTAGE OF NET COMPANY SALES (MOST RECENT FISCAL YEAR)**	.34	.29	.64	.29	.40	.28
TOTAL	31	2	3	10	10	6
EXPECTED IS BUDGET INCREASE FOR NEXT FISCAL YEAR**	6.04	10.96	0	3.69	10.30	3.99

* UNWEIGHTED DATA

** DATA WEIGHTED BY INFORMATION SYSTEMS EXPENSE BUDGET

*** QUESTION WAS REWORDED AND RESULTS MAY NOT BE COMPARABLE WITH PREVIOUS YEARS

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 4-3

BUDGET EXPENSES *** – WHOLESALERS

	AVERAGE
TOTAL	16
BUDGET DOLLARS ALLOCATED TO IS DEPARTMENT SALARIES AND WAGES, INCLUDING FRINGE BENEFITS*	4977619
TOTAL	17
BUDGET DOLLARS ALLOCATED TO IS DEPARTMENT SALARIES AND WAGES, EXCLUDING FRINGE BENEFITS*	4148174
TOTAL	17
BUDGET DOLLARS ALLOCATED TO ALL IS DEPARTMENT EXPENSES*	13128804
TOTAL	17
PERCENTAGE OF NET COMPANY SALES BUDGETED TO IS DEPARTMENT (THIS FISCAL YEAR)**	.48
TOTAL	17
ACTUAL IS EXPENSE AS A PERCENTAGE OF NET COMPANY SALES (MOST RECENT FISCAL YEAR)**	.45
TOTAL	17
EXPECTED IS BUDGET INCREASE FOR NEXT FISCAL YEAR**	5.62

* UNWEIGHTED DATA

** DATA WEIGHTED BY INFORMATION SYSTEMS EXPENSE BUDGET

*** QUESTION WAS REWORDED AND RESULTS MAY NOT BE COMPARABLE WITH PREVIOUS YEARS

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

3 F. WHAT PERCENTAGE OF YOUR TOTAL IS BUDGET IS ALLOCATED TO: 1) STORE SYSTEMS, 2) HEADQUARTERS/DISTRIBUTION CENTER SYSTEMS?

TABLE 5-1
PERCENTAGE OF TOTAL IS EXPENSE BUDGET ALLOCATED TO:
-- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	48	3	5	13	15	12
STORE SYSTEMS	22.8	3.8	3.3	22.3	24.8	22.7
HEADQUARTER/DIST. CTR. SYSTEMS	77.2	96.2	96.7	77.7	75.2	77.3

NOTE: DATA WEIGHTED BY INFORMATION SYSTEMS EXPENSE BUDGET

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 5-2
PERCENTAGE OF TOTAL IS EXPENSE BUDGET ALLOCATED TO:
-- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	32	2	4	10	10	6
STORE SYSTEMS	23.9	3.2	4.7	18.1	28.4	23.3
HEADQUARTER/DIST. CTR. SYSTEMS	76.1	96.8	95.3	81.9	71.6	76.7

NOTE: DATA WEIGHTED BY INFORMATION SYSTEMS EXPENSE BUDGET

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 5-3
PERCENTAGE OF TOTAL IS EXPENSE BUDGET ALLOCATED TO:
-- WHOLESALERS

	AVERAGE
TOTAL	16
STORE SYSTEMS	21.5
HEADQUARTER/DIST. CTR. SYSTEMS	78.5

NOTE: DATA WEIGHTED BY INFORMATION SYSTEMS EXPENSE BUDGET

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

Q6. DOES THE IS DEPARTMENT HAVE BUDGETARY RESPONSIBILITY FOR:

TABLE 6-1
RESPONSIBILITIES OF IS DEPARTMENT ** -- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	66	11	9	16	15	14
PERSONAL COMPUTERS	65.2	54.5	44.4	62.5	80.0	71.4
RETAIL SERVICES	47.0	45.5	44.4	68.8	46.7	28.6
VOICE	42.4	18.2	22.2	43.8	60.0	50.0
WORD PROCESSING	40.9	27.3	11.1	37.5	53.3	57.1
MAIL ROOM	18.2	18.2	-	25.0	20.0	14.3

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 6-2
RESPONSIBILITIES OF IS DEPARTMENT ** -- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	46	9	7	12	10	7
PERSONAL COMPUTERS	65.2	55.6	42.9	58.3	90.0	71.4
VOICE	45.7	22.2	14.3	50.0	70.0	57.1
RETAIL SERVICES	45.7	55.6	42.9	66.7	50.0	-
WORD PROCESSING	39.1	33.3	-	41.7	50.0	57.1
MAIL ROOM	19.6	22.2	-	25.0	10.0	28.6

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 6-3

RESPONSIBILITIES OF IS DEPARTMENT ** – WHOLESALERS

%	AVERAGE
TOTAL	20
PERSONAL COMPUTERS	65.0
RETAIL SERVICES	50.0
WORD PROCESSING	45.0
VOICE	35.0
MAIL ROOM	15.0

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TIME ALLOCATION

The survey results show 57.3 percent of time allocated to IS activities being spent on new applications or major enhancements, with 16.7 percent of the time allocated to store systems and 40.6 percent to headquarters/ distribution center systems. Retailers indicated a higher percent of time allocated to new applications/major enhancements than did wholesalers, 60.8 percent vs. 50.6 percent, respectively. The time allocated by all companies to internal IS projects and maintenance/problem solving (8.7 and 31.6 percents, respectively) remained within the narrow range established over the previous four years.

Q4. WHAT PERCENT OF SYSTEMS DEVELOPMENT ACTIVITY INCLUDING YOUR OWN AND VENDOR TIME IS ALLOCATED TO:

TABLE 7-1

PERCENTAGE OF TIME ALLOCATED TO IS ACTIVITIES -- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	62	10	9	15	16	11
NEW APPLICATIONS/MAJOR ENHANCEMENTS FOR:						
STORE SYSTEMS	16.7	13.7	14.3	17.6	23.6	13.2
HEADQUARTER/DIST. CENTER SYSTEMS	40.6	48.8	43.7	37.6	42.0	41.2
INTERNAL IS PROJECTS	8.7	8.5	8.9	8.2	5.5	11.3
MAINTENANCE/PROBLEM SOLVING	31.6	29.0	33.1	34.3	28.9	34.1
OTHER	2.5	0	0	2.3	0	.1

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF SYSTEMS EMPLOYEES

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 7-2

PERCENTAGE OF TIME ALLOCATED TO IS ACTIVITIES -- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	46	9	7	12	11	6
NEW APPLICATIONS/MAJOR ENHANCEMENTS FOR:						
STORE SYSTEMS	18.4	14.1	18.5	19.3	25.1	14.2
HEADQUARTER/DIST. CENTER SYSTEMS	42.4	48.7	38.9	36.9	44.7	45.3
INTERNAL IS PROJECTS	6.5	8.9	10.1	8.4	4.4	7.6
MAINTENANCE/PROBLEM SOLVING	29.0	28.3	32.5	33.3	25.7	32.6
OTHER	3.6	0	0	2.2	0	.3

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF SYSTEMS EMPLOYEES

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 7-3
PERCENTAGE OF TIME ALLOCATED TO IS ACTIVITIES -- WHOLESALERS

	AVERAGE
TOTAL	16
NEW APPLICATIONS/MAJOR ENHANCEMENTS FOR:	
STORE SYSTEMS	13.6
HEADQUARTER/DIST. CENTER SYSTEMS	37.0
INTERNAL IS PROJECTS	12.8
MAINTENANCE/PROBLEM SOLVING	36.4
OTHER	.2

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF SYSTEMS EMPLOYEES

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

DISASTER RECOVERY PLANS

The percent of surveyed companies which reported having a disaster recovery plan in place that has been reviewed in the past twelve months is 56.7 percent. This figure has increased over the last three years from 35.2 percent in 1986 to 56.7 percent in 1989, indicating a greater awareness in the industry of the necessity for this crucial function. Of these companies, 42.1 percent use a remote "hot site," which consists of a fully configured computer center, more or less ready to operate, 18.4 percent have remote "cold sites" which are wired to receive computer equipment but contain none, and 21.1 percent reported using a "dual site" plan. The remaining companies used "other" types of disaster plans.

Companies that tested their disaster plan within the last six months has risen steadily from 17.6 percent in 1985 to 35.5 percent in 1988. This rise is very likely attributable to an increased awareness of the vital role data operations play in the industry and the ominous effects a computer shutdown would have on business.

Q5a. DO YOU HAVE A FORMAL DISASTER RECOVERY PLAN THAT HAS BEEN REVIEWED IN THE PAST TWELVE MONTHS?

Q5b. WHAT TYPE OF DISASTER RECOVERY PLAN DO YOU HAVE?

Q5c. HAVE YOU TESTED THE DISASTER RECOVERY PLAN IN THE LAST SIX MONTHS?

TABLE 8-1

FORMAL DISASTER RECOVERY PLAN -- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	67	11	9	16	16	14
HAVE FORMAL DISASTER RECOVERY PLAN WHICH HAS BEEN REVIEWED IN PAST 12 MONTHS	56.7	45.5	33.3	43.8	56.3	92.9
TYPE OF DISASTER RECOVERY PLAN:						
TOTAL	38	5	3	7	9	13
REMOTE HOT SITE	42.1	40.0	66.7	28.6	44.4	38.5
REMOTE COLD SITE	18.4	40.0	-	14.3	-	30.8
DUAL SITE	21.1	20.0	33.3	28.6	33.3	7.7
OTHER	18.4	-	-	28.6	22.2	23.1
TOTAL	62	11	8	15	16	11
DISASTER RECOVERY PLAN TESTED IN LAST SIX MONTHS	35.5	-	25.0	20.0	56.3	63.6

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 8-2

FORMAL DISASTER RECOVERY PLAN -- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	47	9	7	12	11	7
HAVE FORMAL DISASTER RECOVERY PLAN WHICH HAS BEEN REVIEWED IN PAST 12 MONTHS	55.3	44.4	42.9	33.3	63.6	100.0
TYPE OF DISASTER RECOVERY PLAN:						
TOTAL	26	4	3	4	7	7
REMOTE HOT SITE	42.3	25.0	66.7	25.0	57.1	28.6
REMOTE COLD SITE	23.1	50.0	-	-	-	57.1
DUAL SITE	23.1	25.0	33.3	25.0	28.6	14.3
OTHER	11.5	-	-	50.0	14.3	-
TOTAL	46	9	6	12	11	7
DISASTER RECOVERY PLAN TESTED IN LAST SIX MONTHS	30.4	-	33.3	16.7	54.5	42.9

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 8-3
FORMAL DISASTER RECOVERY PLAN
-- WHOLESALERS

	AVERAGE	TYPE OF DISASTER RECOVERY PLAN:			
TOTAL	20	TOTAL	12	TOTAL	16
HAVE FORMAL DISASTER RECOVERY PLAN WHICH HAS BEEN REVIEWED IN PAST 12 MONTHS	60.0	REMOTE HOT SITE	41.7	DISASTER RECOVERY PLAN TESTED IN LAST SIX MONTHS	50.0
		REMOTE COLD SITE	8.3		
		DUAL SITE	16.7		
		OTHER	33.3		

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

EXPERIENCE WITH SELECTED TECHNOLOGIES

This year, as in previous years, the survey results indicate an increasing percentage of companies moving into the "advanced use" level of a wide range of technologies. In many instances, the increases have been dramatic. For example, the percentage of companies reporting advanced use of distributed processing in-store was 21.7 percent and 29.0 percent for 1986 and 1987, respectively, compared to 39.1 percent in 1988. Advanced use of personal computers connected to a mainframe continued its upward trend, 34.4, 39.7 and 53.0 percent in 1986, 1987 and 1988, respectively.

Electronic Shelf tags are reported to be in advanced use by 6.3 percent of respondents, up from 4.3 percent in 1988 (first year included in survey). Electronic shelf tags are presently being evaluated by 35.7 percent of those responding.

"Expert systems" were reported to be in advanced use for the first time in 1.6 percent of surveyed firms. This leading-edge technology, which is rapidly gaining popularity in the industry, makes use of artificial intelligence to train managers and employees by capturing in a software program the knowledge of human experts in the business.

Experience with Selected Technologies
(% of Companies in each Category)

FIGURE 5

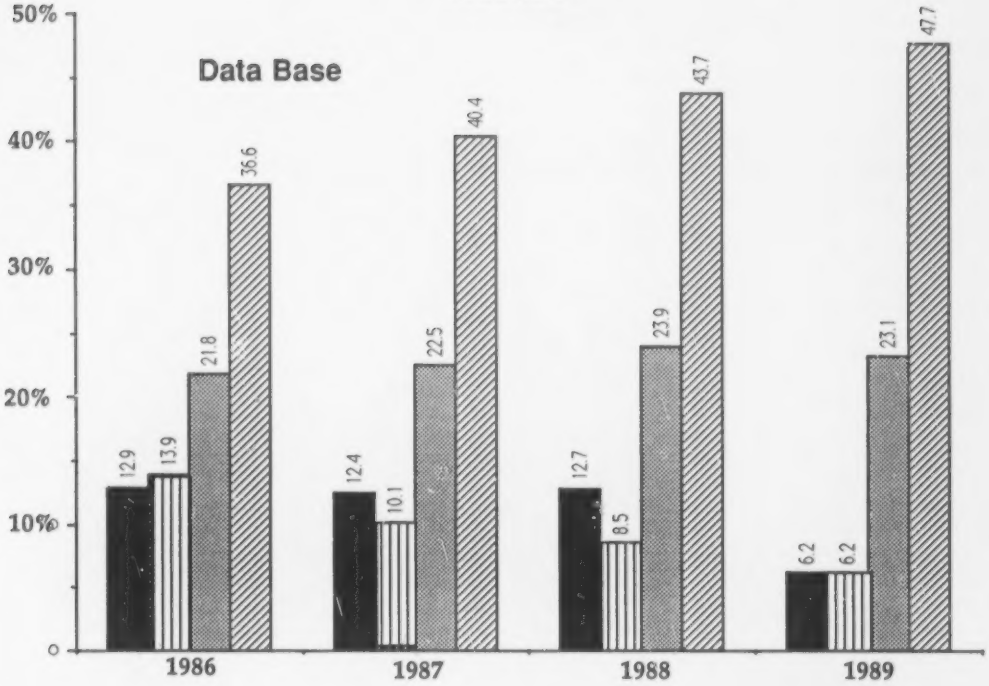
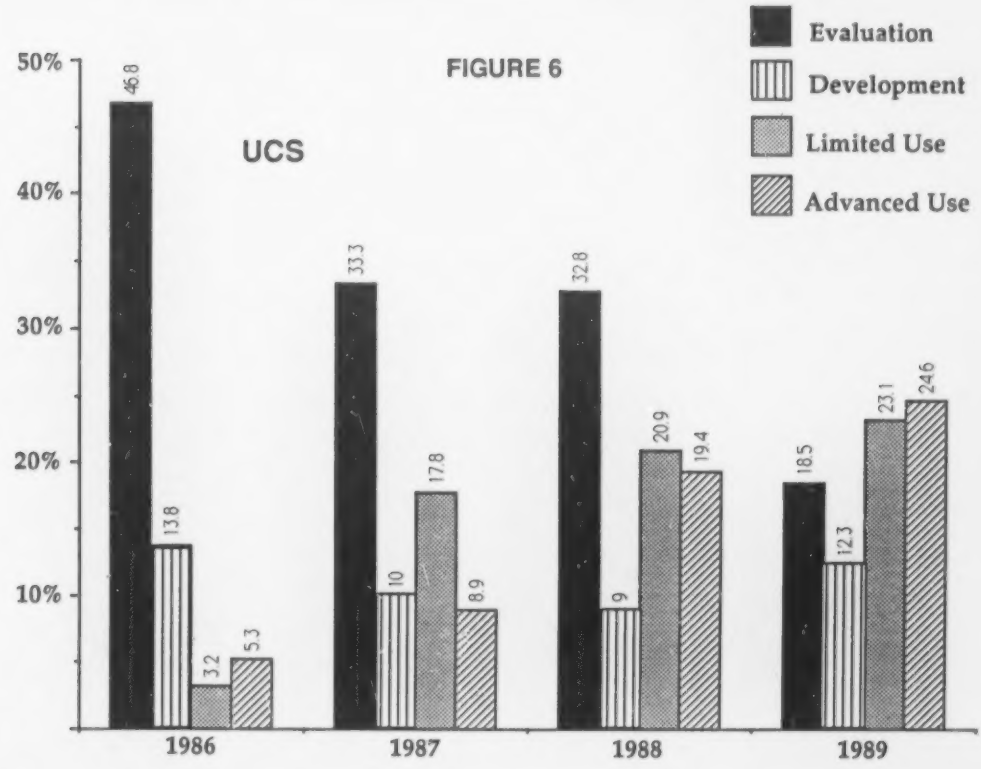


FIGURE 6



Q7. PLEASE CIRCLE THE CORRESPONDING NUMBER IN THE GRID INDICATING THE HIGHEST LEVEL THAT YOUR COMPANY HAS EXPERIENCED FOR THAT TECHNOLOGY AND THE NUMBER OF STORES INVOLVED.

TABLE 9
EXPERIENCE WITH SELECTED TECHNOLOGIES
(PERCENTAGE OF COMPANIES RESPONDING IN EACH CATEGORY)

	EVALUATION	DEVELOPMENT	LIMITED USE	ADVANCED USE	NOT APPLICABLE	TOTAL
INFORMATION CENTER	9.2	1.5	30.8	38.5	20.0	65 100.0
DATA BASE	6.2	6.2	23.1	47.7	16.9	65 100.0
DISTRIBUTED PROCESSING BETWEEN DIVISIONS	12.9	4.8	11.3	29.0	41.9	62 100.0
DISTRIBUTED PROCESSING IN-STORE	18.8	4.7	18.8	39.1	18.8	64 100.0
COMPUTER ASSISTED SYSTEMS ENGINERING (CASE)	32.8	6.3	12.5	1.6	46.9	64 100.0
ELECTRONIC SHELF TAGS	42.9	3.2	3.2	6.3	44.4	63 100.0
COMPUTER GRAPHICS	13.8	6.2	47.7	16.9	15.4	65 100.0
PERSONAL COMPUTERS WITH MAINFRAME CONNECTION	-	-	43.9	53.0	3.0	66 100.0
EFT/ACH	30.8	12.3	6.2	12.3	38.5	65 100.0
ATM	16.9	1.5	26.2	24.6	30.8	65 100.0
EFT-POS	38.5	4.6	10.8	13.8	32.3	65 100.0
UCS	18.5	12.3	23.1	24.6	21.5	65 100.0
UCS/DSD	47.6	3.2	6.3	12.7	30.2	63 100.0
BARCODES FOR STORE ITEMS	6.2	4.6	12.3	69.2	7.7	65 100.0
BARCODES FOR WAREHOUSE ITEMS	25.0	4.7	10.9	28.1	31.3	64 100.0
EXPERT SYSTEMS	35.9	12.5	7.8	1.6	42.2	64 100.0
ON-LINE DOCUMENTATION	13.8	10.8	44.6	9.2	21.5	65 100.0
ON-LINE TRAINING	23.4	7.8	29.7	9.4	29.7	64 100.0

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

Q8a. DO YOU HAVE ANY RETAIL AUTOMATION?

TABLE 10-1
PERCENTAGE OF COMPANIES USING RETAIL AUTOMATION
-- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	67	11	9	16	16	14
HAVE RETAIL AUTOMATION	88.1	72.7	88.9	87.5	93.8	92.9
DO NOT HAVE RETAIL AUTOMATION	11.9	27.3	11.1	12.5	6.3	7.1

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 10-2
PERCENTAGE OF COMPANIES USING RETAIL AUTOMATION
-- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	47	9	7	12	11	7
HAVE RETAIL AUTOMATION	83.0	66.7	85.7	83.3	90.9	85.7
DO NOT HAVE RETAIL AUTOMATION	17.0	33.3	14.3	16.7	9.1	14.3

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 10-3
PERCENTAGE OF COMPANIES USING RETAIL AUTOMATION
-- WHOLESALERS

	AVERAGE
TOTAL	20
HAVE RETAIL AUTOMATION	100.0
DO NOT HAVE RETAIL AUTOMATION	-

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

Q8b. FOR PERSONAL COMPUTERS AND/OR MINI COMPUTERS, PLEASE INDICATE THE NUMBER OF STORES IN WHICH RETAIL AUTOMATION IS BEING TESTED OR IS IN FINAL PRODUCTION.

TABLE 11
PERCENTAGE OF STORES USING RETAIL AUTOMATION

	TEST		PRODUCTION	
	PC	MINI	PC	MINI
TOTAL	8222	8222	8222	8222
DSD	.3	.1	17.0	11.7
LABOR SCHEDULING	.3	.5	11.6	12.3
VIDEO RENTALS	.1	-	13.9	2.4
ELECTRONIC MAIL	.1	-	21.1	12.1
SCAN INTERFACE	.4	-	10.7	32.5
PHARMACY	-	-	7.0	14.8
ADMINISTRATION	.2	-	13.2	1.6
TIME AND ATTENDANCE	.2	.5	15.9	16.1
SCALE INTERCONNECT	-	.1	4.7	4.8
OTHER	.3	-	4.7	2.7

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

VOICE AND DATA COMMUNICATIONS

Last year the study examined, for the first time, the voice and data communications elements of IS departments. This years' results did not change significantly. While slightly higher numbers reported their communications staff reported to a single manager (55.4 percent in 1988 vs. 51.4 percent in 1987), 91.7 percent of the respondents reported that manager was located in the IS department, remaining consistent with last year's results.

Q9. DOES YOUR VOICE AND DATA COMMUNICATIONS STAFF REPORT TO A SINGLE MANAGER?

IS THAT MANAGER IN YOUR INFORMATION SYSTEMS DEPARTMENT?

WHAT IS YOUR ANNUAL TELECOMMUNICATIONS COST FOR:

WHAT TYPE OF TELEPHONE SYSTEMS DO YOU USE IN YOUR STORES?

DO YOU USE TRANSMISSION FACILITIES IN YOUR BUSINESS?

DO THEY CONNECT: DATA CENTERS, REGIONAL OF LATA HUBS, STORES?

TABLE 12-1

PERCENTAGE OF COMMUNICATIONS STAFF REPORTING TO A SINGLE MANAGER -- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	65	10	9	15	16	14
REPORTS TO A SINGLE MANAGER	55.4	70.0	44.4	33.3	62.5	64.3
DOES NOT REPORT TO A SINGLE MANAGER	44.6	30.0	55.6	66.7	37.5	35.7

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 12-2

PERCENTAGE OF COMMUNICATIONS STAFF REPORTING TO A SINGLE MANAGER -- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	47	9	7	12	11	7
REPORTS TO A SINGLE MANAGER	59.6	77.8	42.9	33.3	72.7	71.4
DOES NOT REPORT TO A SINGLE MANAGER	40.4	22.2	57.1	66.7	27.3	28.6

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 12-3

PERCENTAGE OF COMMUNICATIONS STAFF REPORTING TO A SINGLE MANAGER -- WHOLESALERS

	AVERAGE
TOTAL	18
REPORTS TO A SINGLE MANAGER	44.4
DOES NOT REPORT TO A SINGLE MANAGER	55.6

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 13-1
PERCENTAGE OF MANAGERS IN INFORMATION SYSTEMS DEPARTMENT -- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	36	7	4	5	10	9
MANAGER IS IN INFORMATION DEPARTMENT	91.7	85.7	100.0	80.0	90.0	100.0
MANAGER IS NOT IN INFORMATION DEPARTMENT	8.3	14.3	-	20.0	10.0	-

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 13-2
PERCENTAGE OF MANAGERS IN INFORMATION SYSTEMS DEPARTMENT -- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	28	7	3	4	8	5
MANAGER IS IN INFORMATION DEPARTMENT	92.9	85.7	100.0	75.0	100.0	100.0
MANAGER IS NOT IN INFORMATION DEPARTMENT	7.1	14.3	-	25.0	-	-

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 13-3
PERCENTAGE OF MANAGERS IN INFORMATION SYSTEMS DEPARTMENT -- WHOLESALERS

	AVERAGE
TOTAL	8
MANAGER IS IN INFORMATION DEPARTMENT	87.5
MANAGER IS NOT IN INFORMATION DEPARTMENT	12.5

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

9 C. WHAT IS YOUR ANNUAL TELECOMMUNICATIONS COST FOR:

TABLE 14-1
ANNUAL TELECOMMUNICATIONS COSTS
-- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	37	3	3	10	9	12
VOICE	1033114	71495	8500	313641	461055	2558276
TOTAL	37	3	3	10	9	12
DATA	527022	7033	46333	75728	221959	1382068
TOTAL	37	3	3	10	9	12
OTHER	112692	0	0	43000	2222	309967
TOTAL	39	3	3	11	9	12
TOTAL COSTS	1784153	78528	54833	426366	685237	4250311

* UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 14-2
ANNUAL TELECOMMUNICATIONS COSTS
-- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	24	3	2	8	5	6
VOICE	759325	71495	1000	257676	625400	2136485
TOTAL	24	3	2	8	5	6
DATA	450544	7033	16000	53410	279300	1489363
TOTAL	24	3	2	8	5	6
OTHER	111250	0	0	3750	4000	436667
TOTAL	26	3	2	9	5	6
TOTAL COSTS	1515161	78528	17000	320558	908700	4062515

* UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 14-3
ANNUAL TELECOMMUNICATIONS COSTS -- WHOLESALERS

	AVERAGE
TOTAL	13
VOICE	1538569
TOTAL	13
DATA	668213
TOTAL	13
OTHER	115354
TOTAL	13
TOTAL COSTS	2322136

* UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

9 D. WHAT TYPE OF TELEPHONE SYSTEMS DO YOU USE IN YOUR STORES?

TABLE 15-1
TELEPHONE SYSTEMS -- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	67	11	9	16	16	14
KEY SYSTEMS	55.2	36.4	77.8	43.8	68.8	57.1
PBX	29.9	18.2	22.2	37.5	25.0	35.7
CENTREX	16.4	27.3	-	18.8	12.5	21.4

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 15-2
TELEPHONE SYSTEMS -- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	47	9	7	12	11	7
KEY SYSTEMS	66.0	44.4	85.7	50.0	90.9	71.4
PBX	27.7	22.2	28.6	33.3	18.2	28.6
CENTREX	19.1	33.3	-	16.7	9.1	42.9

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 15-3
TELEPHONE SYSTEMS -- WHOLESALERS

	AVERAGE
TOTAL	20
KEY SYSTEMS	30.0
PBX	35.0
CENTREX	10.0

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

9 E. DO YOU USE TRANSMISSION FACILITIES IN YOUR BUSINESS?

TABLE 16-1
T1 TRANMISSION FACILITIES
-- ALL COMPANIES

	TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)					
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	60	8	8	14	16	13
USE T1 TRANSMISSION FACILITIES	31.7	-	12.5	28.6	43.8	46.2
DO NOT USE T1 TRANSMISSION FACILITIES	68.3	100.0	87.5	71.4	56.3	53.8

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 16-2
T1 TRANMISSION FACILITIES
-- RETAILERS

	TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)					
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	45	8	7	12	11	6
USE T1 TRANSMISSION FACILITIES	28.9	-	14.3	16.7	54.5	50.0
DO NOT USE T1 TRANSMISSION FACILITIES	71.1	100.0	85.7	83.3	45.5	50.0

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 16-3
T1 TRANMISSION FACILITIES
-- WHOLESALERS

	AVERAGE
TOTAL	15
USE T1 TRANSMISSION FACILITIES	40.0
DO NOT USE T1 TRANSMISSION FACILITIES	60.0

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

9 F. DO THEY CONNECT: DATA CENTERS, REGIONAL OR LATA HUBS, STORES?

TABLE 17-1
T1 TRANSMISSIONS CONNECTIONS
-- ALL COMPANIES

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	19	0	1	4	7	6
DATA CENTERS	63.2	-	100.0	50.0	57.1	83.3
REGIONAL OR LATA HUBS	47.4	-	-	75.0	42.9	33.3
STORES?	15.8	-	100.0	-	28.6	-

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 17-2
T1 TRANSMISSIONS CONNECTIONS
-- RETAILERS

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	13	0	1	2	6	3
DATA CENTERS	69.2	-	100.0	50.0	66.7	100.0
REGIONAL OR LATA HUBS	46.2	-	-	50.0	50.0	33.3
STORES?	15.4	-	100.0	-	16.7	-

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

TABLE 17-3
T1 TRANSMISSIONS CONNECTIONS
-- WHOLESALERS

	AVERAGE
TOTAL	6
DATA CENTERS	50.0
REGIONAL OR LATA HUBS	50.0
STORES?	16.7

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

METHODOLOGY

The 1989 survey questionnaires were mailed to the Vice President of Information Systems of FMI member companies with annual sales of $50 million or greater. With follow-up mailings, usable questionnaires were returned by 67 companies. A copy of the questionnaire has been included in this report. A profile of the respondents appears in Table 18.

The survey results have been tabulated by the size of the company and whether the company is a retailer or a wholesaler. Where appropriate, the reported averages have been weighted by the size of company.

The companion publication, FMI's 1989 *Information Systems Directory*, provides information on hardware, software and systems development activities from many food retailers and wholesalers. It may be ordered from FMI's publication sales department.

TABLE 18-1
NUMBER OF RESPONDENTS BY SIZE AND TYPE OF COMPANY

		TOTAL ANNUAL COMPANY SALES (IN MILLIONS OF DOLLARS)				
	AVERAGE	$ 50-249	$ 250-499	$ 500-999	$ 1000-2999	$ 3 BILLION+
TOTAL	67	11	9	16	16	14
RETAILERS	47	9	7	12	11	7
WHOLESALERS	20	2	2	4	5	7

NOTE: UNWEIGHTED DATA

SOURCE: INFORMATION SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1989

FMI INFORMATION SYSTEMS STUDY, 1989

Each year, FMI conducts a survey on the information system (IS) activities of member companies. The purpose of the survey is to provide executives responsible for information systems with current statistics that will be helpful in assessing the performance of their own company's operation.

In responding to this survey, please:

- o Answer as many questions as possible.
- o Only include information relating to divisions/departments that are involved with the information systems department.

All data will be held in strict confidence. If you have any questions please call FMI's research department at 202-429-8277.

INFORMATION SYSTEMS DEPARTMENT STAFFING

1. Please provide the number of employees in your company directly involved in the information systems function. You may use fractional allocations where appropriate. (Employees listed in Question 1 will typically be part of the IS department/division, not a user group.)

	Number of Employees in Information Systems Department	Totals
IS Administration:		
General Administration/Secretarial	_____	
Senior Management	_____	
Total Management		_____
Systems:		
Administration & Management	_____	
Data Base/Data Administration	_____	
Project Management	_____	
Development (Analyst/Programmers)	_____	
Other	_____	
Total Systems		_____
Operations:		
Administration, Management, Supervision	_____	
Operations	_____	
Data Entry Employees	_____	
Other	_____	
Total Operations		_____
Additional Support Areas:		
Store Systems Support	_____	
Scanning Support	_____	
Information Center	_____	
Help Desk	_____	
Data Security	_____	
Telecommunications Voice	_____	
Telecommunications Data	_____	
Technical Support/Systems Programmers	_____	
Retail Automation Support	_____	
Quality Assurance	_____	
Other	_____	
Total Additional Support Areas		_____
TOTAL EMPLOYEES		_____

2. For this fiscal year, please provide the PERCENT OF YOUR TOTAL COMPANY INFORMATION SYSTEMS EXPENSE BUDGET that is your budget responsibility allocated to each of the following areas. Please exclude all equipment and maintenance costs for in-store systems. (Please give percents as two-digit numbers plus one decimal place, i.e. 12.5%)

Wages and Salaries		___ ___ ___ . ___%
Employee Fringe Benefits		___ ___ ___ . ___%
Equipment:	Rental and Lease	___ ___ ___ . ___%
	Maintenance	___ ___ ___ . ___%
	Depreciation	___ ___ ___ . ___%
Software Rental, Amortization/Software Purchase		___ ___ ___ . ___%
Voice Communications		___ ___ ___ . ___%
Data Communications		___ ___ ___ . ___%
Service Bureaus		___ ___ ___ . ___%
Outside Professional Services		___ ___ ___ . ___%
Education, Training		___ ___ ___ . ___%
Supplies		___ ___ ___ . ___%
Overhead (occupancy, copies, printing)		___ ___ ___ . ___%
Disaster Recovery*		___ ___ ___ . ___%
Help Desk		___ ___ ___ . ___%
Personal Computers Retail Service		___ ___ ___ . ___%
Scanning		___ ___ ___ . ___%
Other		___ ___ ___ . ___%
TOTAL		1 0 0 . 0 %

* Funds allocated to offsite storage of information and backup computer processing capabilities.

3. Please provide the following IS expense budget numbers for this fiscal year. Only account for those items that are your budget responsibility. (Please give percents as two-digit numbers, i.e., twelve percent = 12%, one tenth of one percent = .10%)

a. Dollars of total company expense budget allocated for IS WAGES AND SALARIES?
   Including fringe benefits.....$_____
   Excluding fringe benefits.....$_____

b. Dollars of TOTAL COMPANY EXPENSE BUDGET for all IS items covered in Question 2 .....$_____

c. Percent of net company SALES BUDGETED FOR THE IS DEPARTMENT for this fiscal year..... .___ ___%

d. Actual IS DOLLARS SPENT for most recently completed fiscal year as a PERCENT of net company sales..... .___ ___%

e. EXPECTED PERCENT INCREASE in your budget for IS items in the upcoming fiscal year.....__ __ . __ __%

f. What percent of your total IS expense budget is allocated to:

A. Store Systems	___ ___ ___%
B. Headquarter/Distribution Center Systems	___ ___ ___%
TOTAL	1 0 0%

g. Would you be willing to provide further details of IS department expenditures? (Circle) Yes 1 No 2

INFORMATION SYSTEMS ACTIVITIES & TECHNOLOGY

4. What percent of systems development activity including your own and vendor time is allocated to:

New applications/major enhancements for:	Store Systems	___ ___ ___%
	Headquarter/Distribution Center Systems	___ ___ ___%
Internal IS projects (research, performance, improvement, etc.)		___ ___ ___%
Maintenance and problem-solving		___ ___ ___%
Other (please list)_____		___ ___ ___%
		1 0 0%

5a. Do you have a formal disaster recovery plan that has been reviewed in the last 12 months?
(Please circle) /1/ Yes (Go to Question 5b) /2/ No (Go to Question 5c)

5b. What type of disaster recovery plan do you have:

A. Remote hot site.../1/
B. Remote cold site../2/
C. Dual site.../3/
D. Other...../4/

5c. Have you tested the disaster recovery plan in the last six months?...../1/ Yes /2/ No

6. Does the IS department have budgetary responsibility for:

Mail Room...../1/ Yes /2/ No
Word Processing...../1/ Yes /2/ No
Voice...../1/ Yes /2/ No
Personal Computers...../1/ Yes /2/ No
Retail Services...../1/ Yes /2/ No

7. PLEASE CIRCLE the corresponding number in the grid indicating the HIGHEST level that your company has experienced for that technology and the number of stores involved.

	LEVEL OF EXPERIENCE					
TECHNOLOGY	EVALUATION	DEVELOPMENT	LIMITED USE	ADVANCED USE	NUMBER OF STORES (if applicable)	NOT APPLICABLE
Information Center.....	1	2	3	4	___ ___ ___	5
Data Base.....	1	2	3	4	___ ___ ___	5
Distributed Processing Between Divisions	1	2	3	4	___ ___ ___	5
Distributed Processing In-Store.....	1	2	3	4	___ ___ ___	5
Computer Assisted Systems Engineering (CASE)	1	2	3	4	___ ___ ___	5
Electronic Shelf Tags.....	1	2	3	4	___ ___ ___	5
Computer Graphics.....	1	2	3	4	___ ___ ___	5
Personal Computers with Mainframe Connection.....	1	2	3	4	___ ___ ___	5
EFT/ACH.....	1	2	3	4	___ ___ ___	5
ATM.....	1	2	3	4	___ ___ ___	5
EFT/POS (Debit Card at Checkout).....	1	2	3	4	___ ___ ___	5
UCS.....	1	2	3	4	___ ___ ___	5
UCS/DSD.....	1	2	3	4	___ ___ ___	5
Barcodes for Store Items.....	1	2	3	4	___ ___ ___	5
Barcodes for Warehouse Items.....	1	2	3	4	___ ___ ___	5
Expert Systems.....	1	2	3	4	___ ___ ___	5
On-line Documentation.....	1	2	3	4	___ ___ ___	5
On-line Training.....	1	2	3	4	___ ___ ___	5

* Includes: Electronic Mail, Word Processing, Voice Message, Calendar, Desk Top Publishing

8a. Do you have any retail automation? (Please circle 1 or 2) /1/ Yes _____stores (Go to Question 8b)
/2/ No (Go to Question 9)

8b. For personal computers and/or mini computers, please indicate the NUMBER OF STORES in which retail automation is either being tested or is in full production:

	TEST		PRODUCTION	
	PC	MINI	PC	MINI
DSD	_____ stores	_____ stores	_____ stores	_____ stores
Labor Scheduling	_____ stores	_____ stores	_____ stores	_____ stores
Video Rentals	_____ stores	_____ stores	_____ stores	_____ stores
Electronic Mail	_____ stores	_____ stores	_____ stores	_____ stores
Scan Interface	_____ stores	_____ stores	_____ stores	_____ stores
Pharmacy	_____ stores	_____ stores	_____ stores	_____ stores
Administration	_____ stores	_____ stores	_____ stores	_____ stores
Time and Attendance	_____ stores	_____ stores	_____ stores	_____ stores
Scale Interconnect	_____ stores	_____ stores	_____ stores	_____ stores
Other (specify)_____	_____ stores	_____ stores	_____ stores	_____ stores

TELECOMMUNICATIONS

9. a. Does your voice and data communications staff report to a single manager? 1 Yes (Go to Question 9b)
2 No (Go to Question 9c)

b. Is that manager in your information systems department? (PLEASE CIRCLE) /1/ Yes /2/ No

c. What is your annual telecommunications cost for:

Voice	$ _____
Data	$ _____
Other	$ _____
TOTAL	$ _____

d. What type of telephone systems do you use in your stores? (Circle all that apply)
/1/ KEY SYSTEMS /2/ PBX /3/ CENTREX

e. Do you use T1 transmission facilities in your business? /1/ Yes (Go to Question 9f)
/2/ No (Go to Question 10)

f. Do they connect (Circle all that apply) /1/ Data Centers /2/ Regional or LATA Hubs /3/ Stores?

GENERAL INFORMATION

10. What are the three highest concerns or issues you, as an MIS executive for your organization, face in the next three years?

A. _____

B. _____

C. _____

11. What were your total annual company sales for your most recent fiscal year (only include divisions/departments for which you are providing IS service)?.....$_____

12. Is your company primarily (majority of your sales) a food:...../1/ Retailer /2/ Wholesaler

13. In this survey, have you reported information for your: A. Total supermarket company..... /1/
B. A division/subsidiary/partial company of a supermarket corp.... /2/

14. How many supermarkets (those food stores with at least $2 million annual sales) did you operate in 1988?..... __,__ __ __stores

15. What were your total 1988 supermarket sales?..... $__ __,__ __ __.__million

16. May we list your company as a participant in this report? (Please circle) /1/ Yes /2/ No

DO YOU WANT TO LEARN MORE ABOUT OTHER PUBLICATIONS?

YES! Please send me more information about the following publications:

INDUSTRY STUDIES

- ❑ The Food Marketing Industry Speaks -- an annual report on the state of the industry
- ❑ Management Compensation Study for Wholesalers and Large Retailers
- ❑ Retail Seafood Study -- 1987
- ❑ Customer and Employee Accident Study
- ❑ Facts About Store Development

FINANCIAL STUDIES

- ❑ Annual Financial Review
- ❑ Checks and Cash Transactions: a cost analysis for the supermarket
- ❑ Operating Results of Independent Supermarkets
- ❑ Operations Review
- ❑ Supermarket Financial Operations Profile

COMPUTER AND INFORMATION SYSTEMS STUDIES

- ❑ Direct Product Profit: a Primer
- ❑ Supermarket Software Directory
- ❑ Information Systems Directory -- a list of hardware and software

CONSUMER RESEARCH

- ❑ Trends -- Consumer Attitudes and the Supermarket
- ❑ Shopping a la Carte
- ❑ Dinnertime USA

Name _____

Title _____

Company _____

Address _____

_____

Please return this form to:

FMI Research Dept., 1750 K St., N.W., Washington, D.C. 20006

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